beta

fdms.gov

eRulemaking
FDMS.gov 4.0 Beta
Release Notes

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Deliverable to:
eRULEMAKING PMO
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Release 4.0

FDMS 4.0 Beta, deployed June 2012, gives FDMS.gov a new look and feel and offers agency staff a new way to search for and view regulatory documents contained in FDMS.

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Site Redesign

Home Page

Dockets can be accessed using multiple pathways such as the Inbox, My Favorites, Recently Viewed, as well as your Search Results. Similarly, documents can be accessed via any of the foregoing, as well as the FR Feed, Flagged Documents and the Docket Tree.
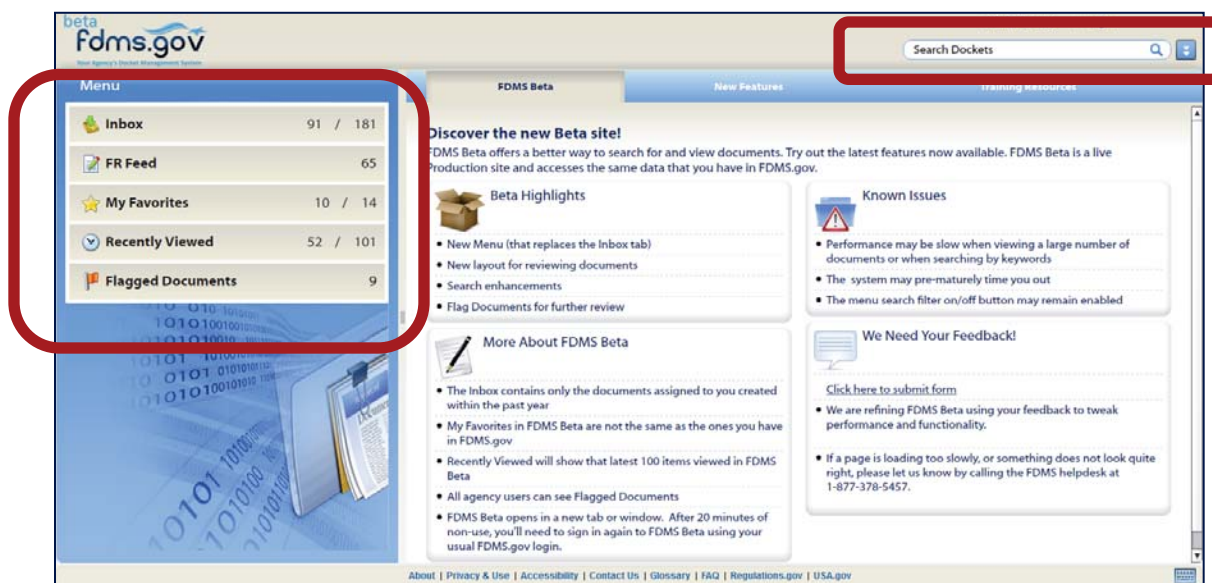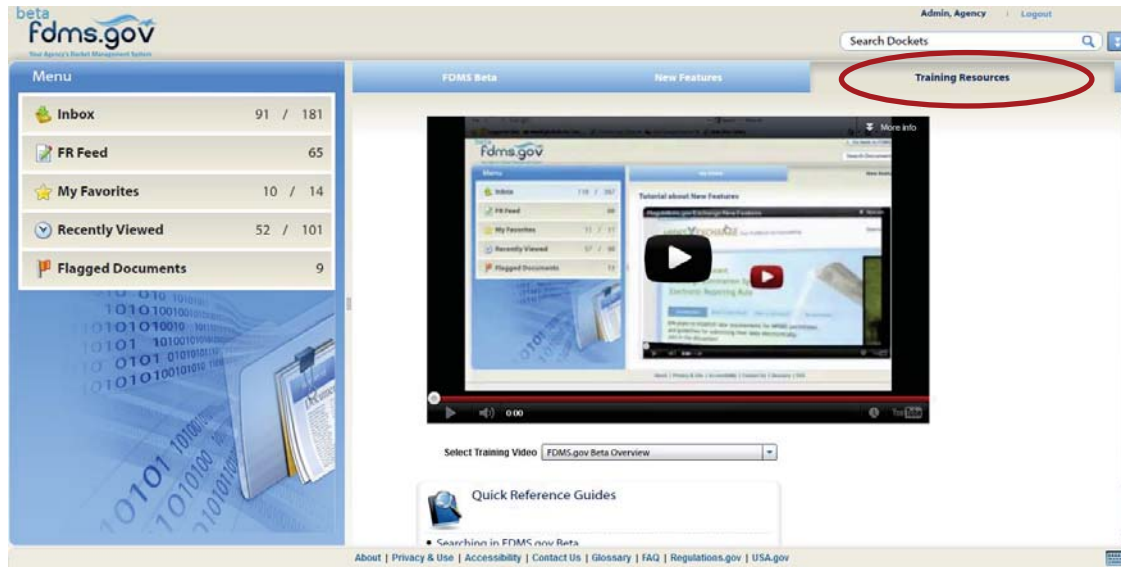

User Tabs – New Features

The New Features tab contains information on features and functionality included in FDMS 4.0 Beta and other announcements and system information.
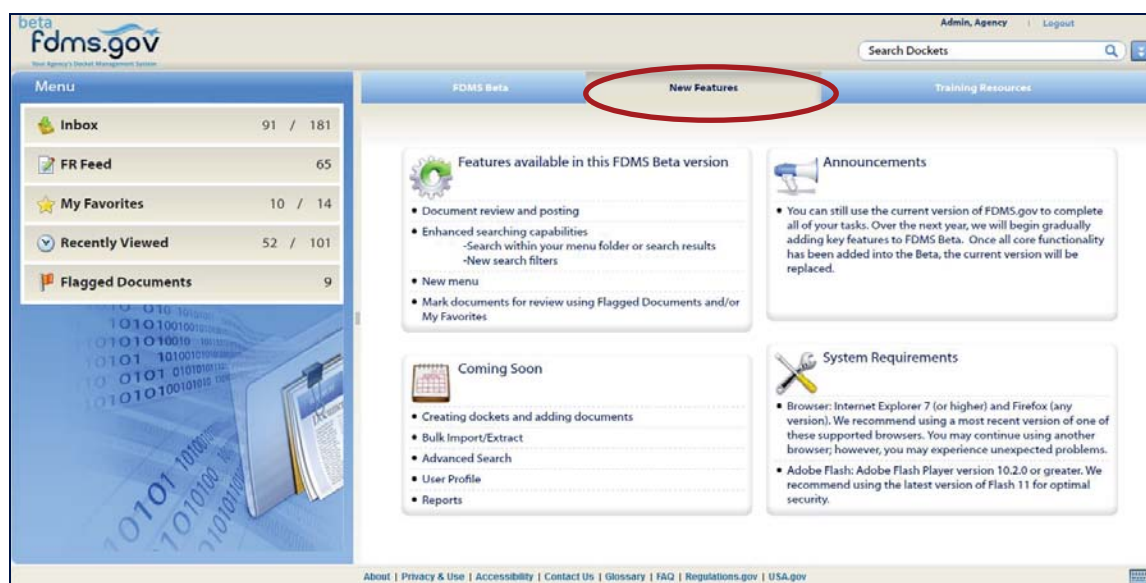
User Tabs - Training Resources

There are new training videos and Quick Reference Guides under the Training Resources tab to help users get started with the FDMS 4.0 Beta version.

Menu

The General Menu screen includes folders for the Inbox, FR Feed (when documents are available), My Favorites, Recently Viewed, and Flagged Documents. There are counts (e.g., "91/181") beside each folder, referring either to the number of available Dockets or Documents, indicated by hover-over text.
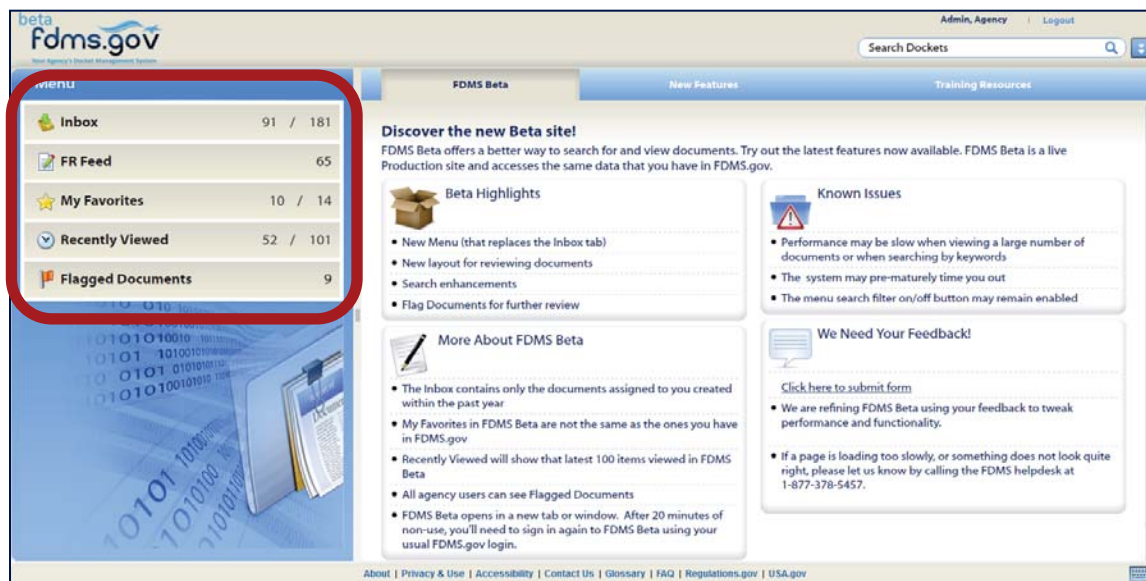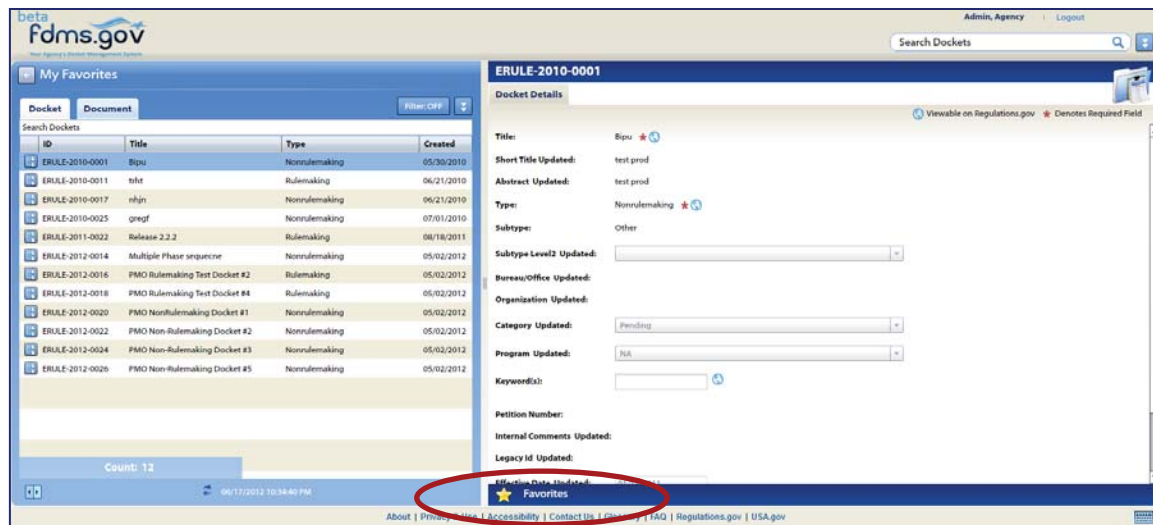

FR Feed

The FR Feed folder is available to those users who are assigned to the "FR User Group." The FR Feed screen includes Docket and Document tabs. A docket tree link is available for Docket content navigation. Docket and Document Details are displayed in the right pane when an ID is selected.
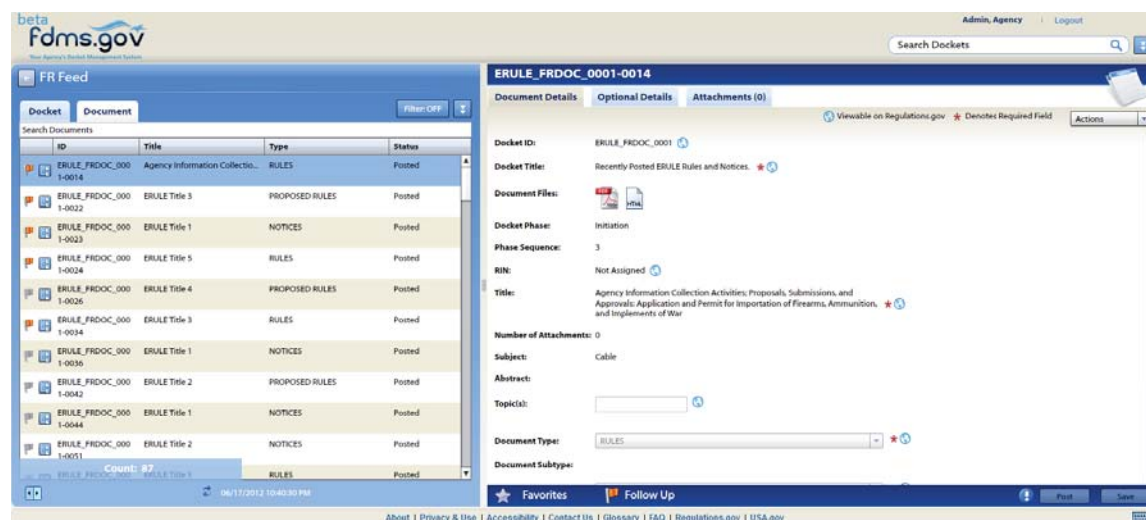
My Favorites

The "My Favorites" folder refers to the dockets and documents which the user has designated as a 'favorite'. A user can designate any Docket or Document as a Favorite by clicking on the ⭐ icon beneath the Document Details. Note: The "My Favorites" in FDMS 4.0 Beta version are not the same as those the user has designated as favorites in the current FDMS environment.

Recently Viewed

The "Recently Viewed" folder contains the last 100 most recently viewed Dockets and Documents. The list for each will default to a sort by date viewed. Users can also use the filtering capability to sort by the other columns available.

Flagged Documents

With the "Flagged Documents" feature users can mark specific documents for either future follow-up, or indicate whether additional review is needed. All agency users can add and remove Flags from Documents. Unlike the documents that you mark as "My Favorites," your "Flagged Documents" can be viewed by all agency users.
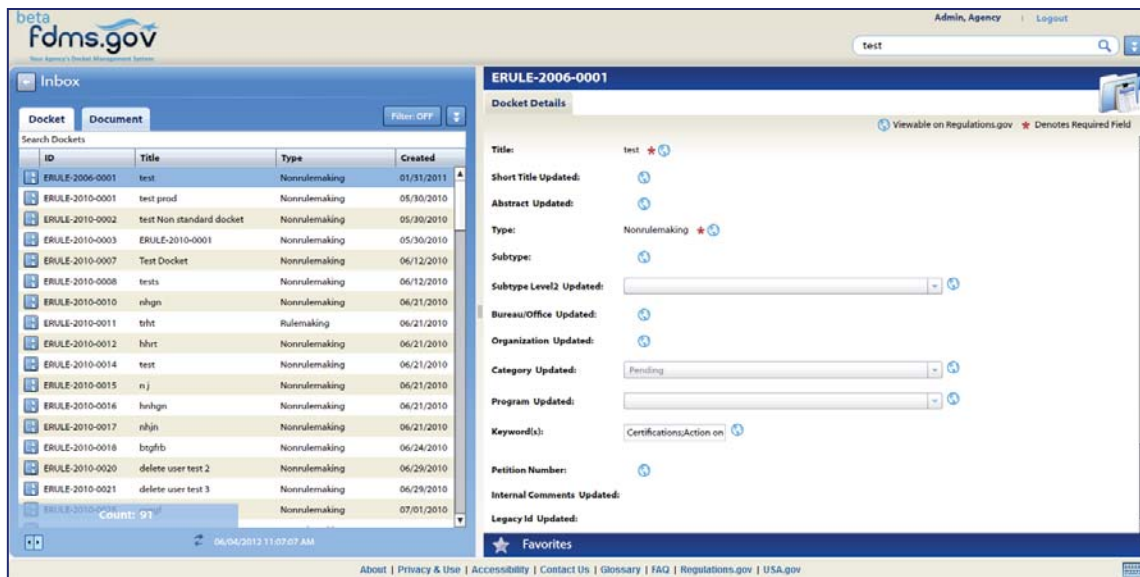
The Docket and Document Filters can be set to show Flagged Documents.
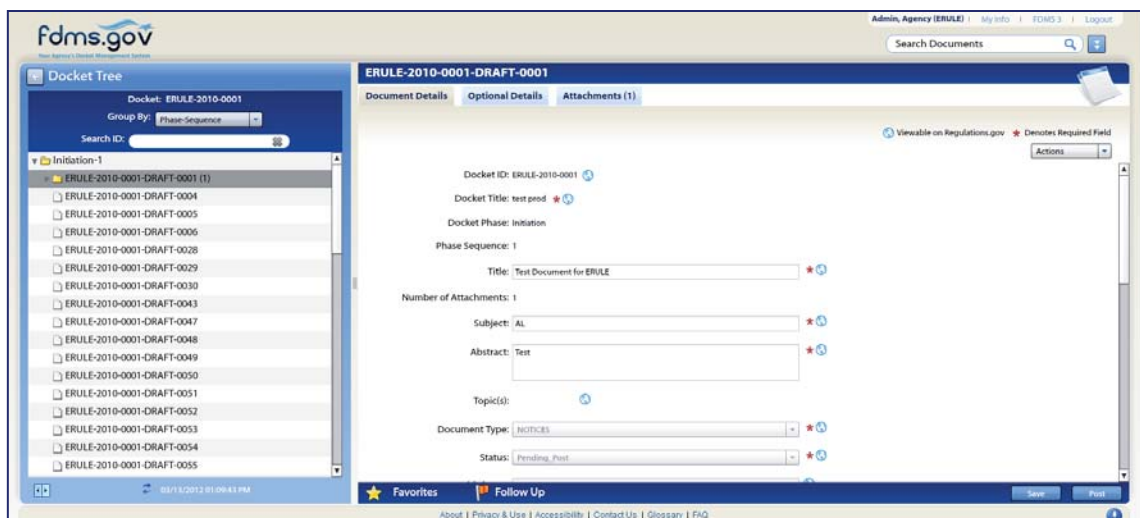
Functionality Included in FDMS 4.0 Beta

Docket Management
Docket Details

Docket Details are available for users to view in a read-only format.

Docket Tree

Users can access the Docket Tree from multiple areas by click on the ▦ icon in the Docket list. Within the Docket Tree users can group their dockets by: Phase Sequence, Status, Date Received, and Document Type. Users can also search the list of Documents using the *Search ID* field.

# Document Management
Document Details

The following functionality is available in FDMS 4.0 Beta:

- Documents can be labeled as Favorites or Flagged for follow-up.
- Documents can be posted.
- Save button is displayed instead of "Submit" to save changes.
- The Optional Details tab contains non-required metadata fields.
- The Submitter Information tab can be enabled or disabled.
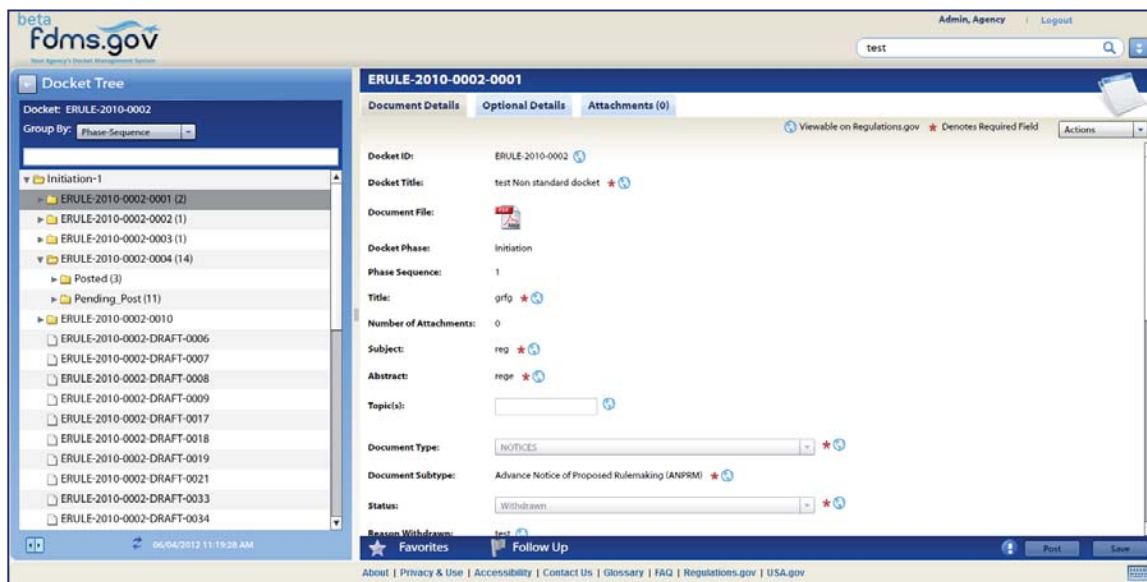
Copy/Move

The Copy and Move options are accessible from the Actions' drop down menu within Document Details.
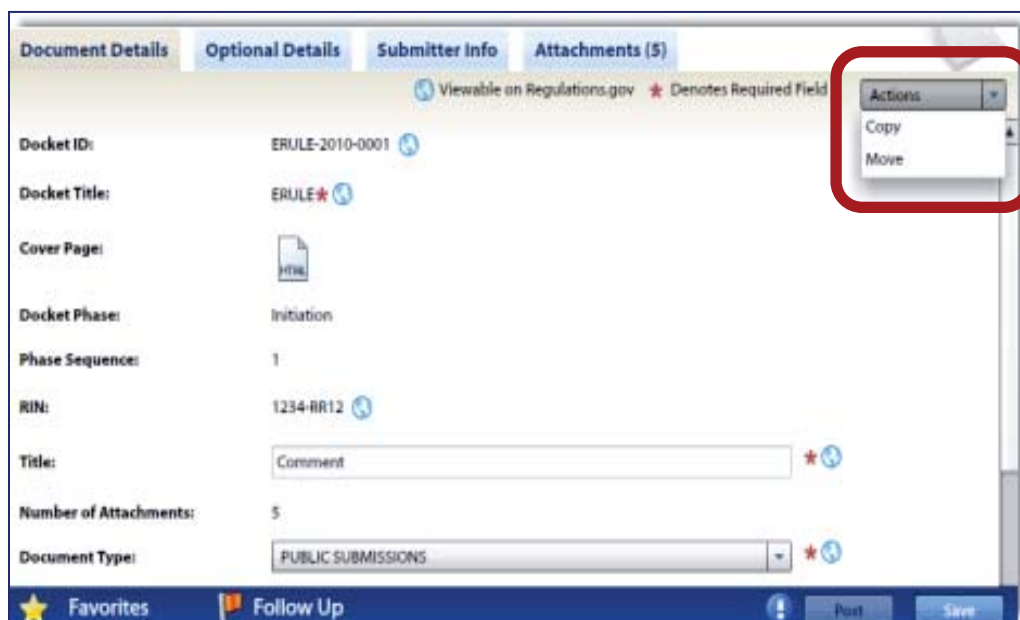
Posting

By simply using the Document Details tab a user can post their documents. If the document is not ready to be posted, the user can view the note containing the reason to the left of the Post button.

Attachments

All Document Attachments are displayed in a split screen view. The highlighted attachment's details are displayed at the bottom of the screen.

Search
Docket/Document Global Search

The metadata fields that are searched via the searched are:
- Document ID, Title (title)
- Abstract (applies to ALL Document Types)
- Subject (subject) -- applies to ALL Document Types EXCEPT Comments, Legacy ID, Comment Tracking Number, Topic(s) (i.e., keywords applied to Document Types FRs AND Other)
- First Name (first_name) -- applies to Document Types WITH Submitter Info
- Last Name (last_name) -- applies to Document Types WITH Submitter Info
- Organization Name (organization) -- applies to Document Types WITH Submitter Info

Whenever an ID (i.e., contains a dash) is entered in the global search field the following fields are searched:
- Document ID -- applies to ALL Document Types
- Legacy ID -- applies to ALL Document Types
- Federal Register Number -- applies to FR Document Types

If the user enters a date as a keyword in the global search field then it must follow the format mm/dd/yyyy. For a date the following metadata fields are searched:
- Author Date -- applies to Document Types Other AND S&RM
- Received Date -- applies to ALL Document Types

Note: Additional search options are available using the drop down to the right of the search box.
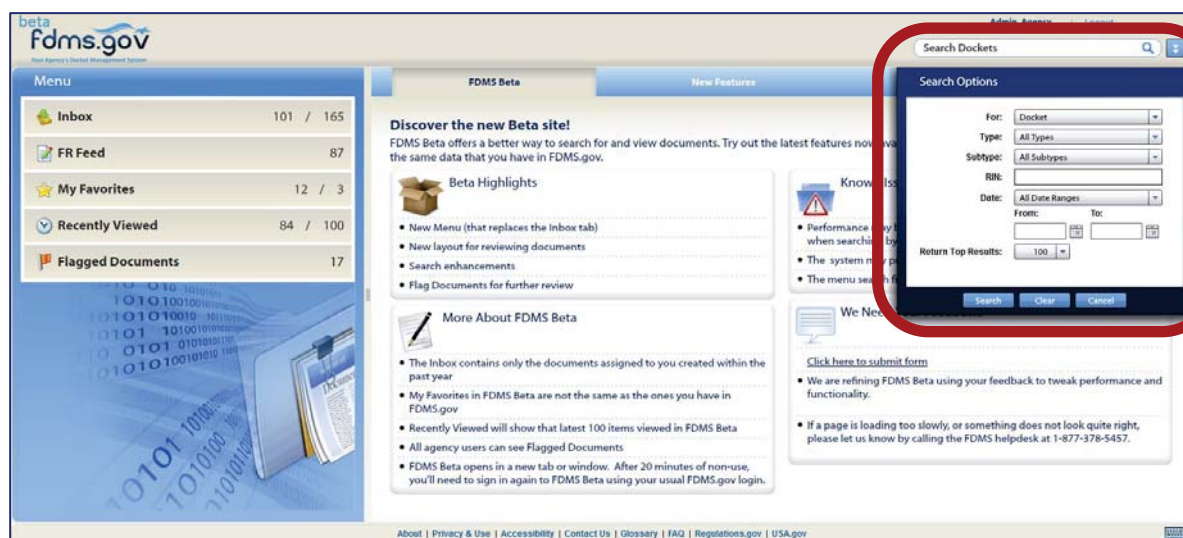
Docket and Document List Search

A Search Bar is available in the Docket and Document lists to narrow results. Additional search filter options are available using the drop down in the upper right part of the pane.
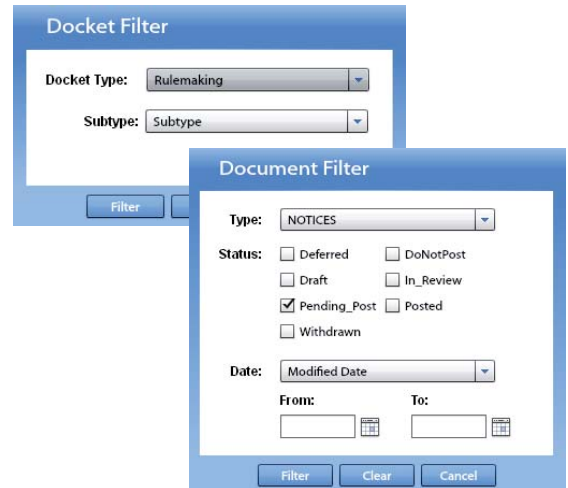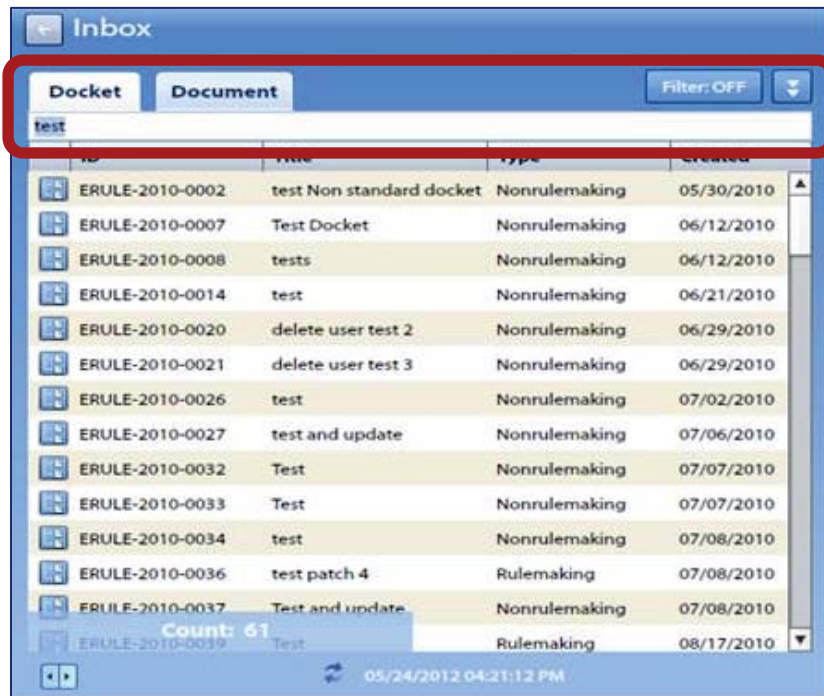
Docket Tree Search

In the Docket Tree, the Group By menu is available for sorting results. Results can be narrowed using the "Filter Docket Tree by ID" search bar.
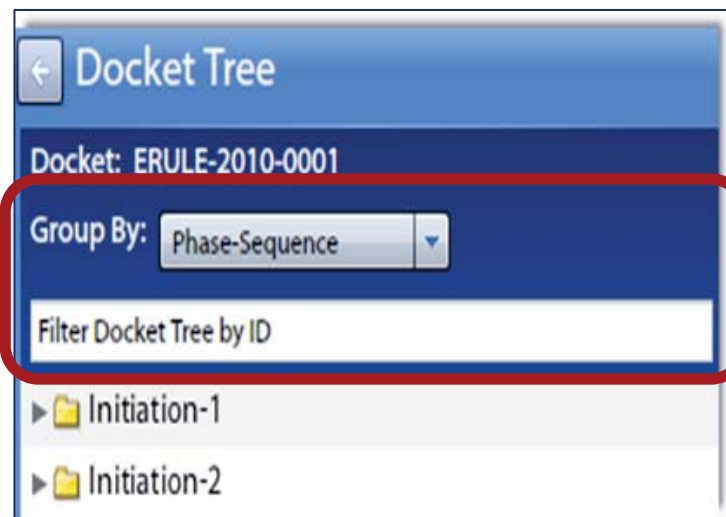
Folder Search

The Documents within a folder are displayed when the folder (Phase folder, Document Type folder, or Status folder) is selected in the Docket Tree. Users can enter an full or partial ID, Title, Type, or Status to be searched in the list below.

Menu Folder Search

Users can enter an full or partial ID, Title, Type, or Status to be searched in the list below.

Menu Folder Filter

There is a Docket and Document filter available within all Menu Folders.
- The system will save a user's filter between sessions.
- Users can toggle the filter on and off in order to view all results or the filtered subset.